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Fishery Products

Annual

2003

Approved by:

Kurt Seifarth
U.S. Embassy

Prepared by:

Marie-Cécile Hénard

Report Highlights:

France is a net importer and a major consumer of seafood products in the European Union. In 2002, the best export opportunities for U.S. seafood products to France were for Alaskan pollack, surimi, lobster, scallops and salmon. In 2002, U.S. exports of Alaskan pollack fillets to France doubled, partially replacing Russian and Chinese products. The U. S. is France's leading supplier of live lobster, which is consumed mainly during the Holiday Season. The U.S. is France's leading supplier of surimi base, which is further processed in France. French surimi consumption and processing have boomed over the past ten years. France is the largest consumer of salmon in the EU. Alaskan salmon faces stiff competition on the French market from Norwegian, Scottish and Irish salmon. Finally, U.S. exports of frozen scallops to France have increased significantly over the past two years as demand continues to grow.

Includes PSD Changes: Yes
Includes Trade Matrix: Yes
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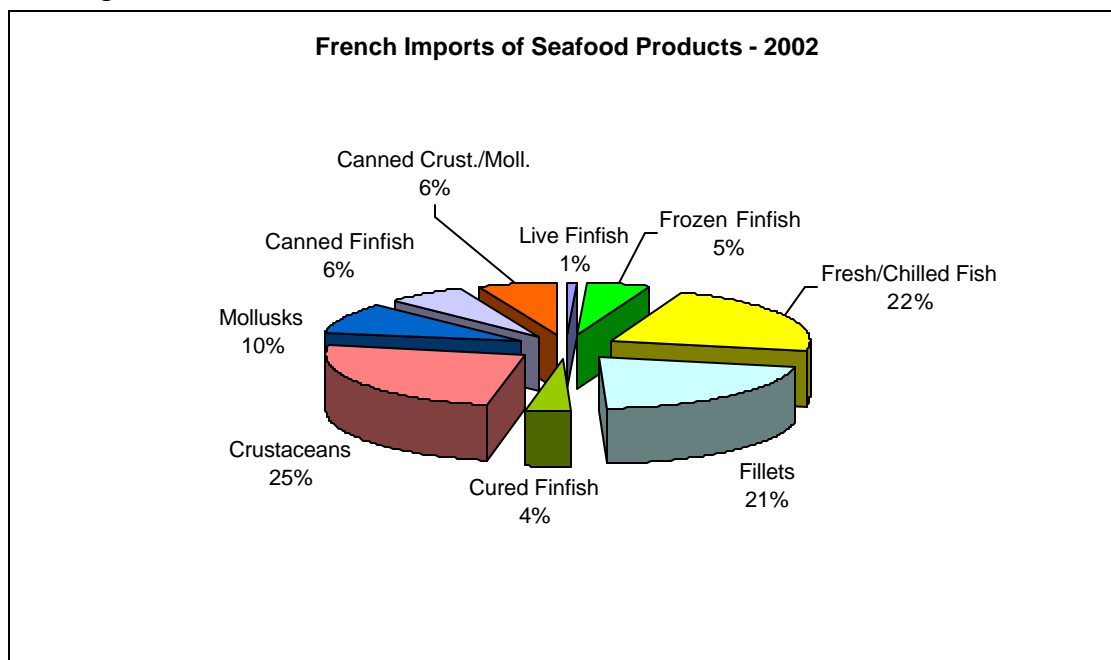
Executive Summary

France is a net importer and a major consumer of seafood products in the European Union. In 2002, the best export opportunities for U.S. seafood products to France were for Alaskan pollack, surimi, lobster, scallops and salmon. In 2002, U.S. exports of Alaskan pollack fillets to France doubled, partially replacing Russian and Chinese products. The U. S. is France's leading supplier of live lobster, which is consumed mainly during the Holiday Season. The U.S. is France's leading supplier of surimi base, which is further processed in France. French surimi consumption and processing have boomed over the past ten years. France is the largest consumer of salmon in the EU. Alaskan salmon faces stiff competition on the French market from Norwegian, Scottish and Irish salmon. Finally, U.S. exports of frozen scallops to France have increased significantly over the past two years as demand continues to grow.

Section I: Situation and Outlook

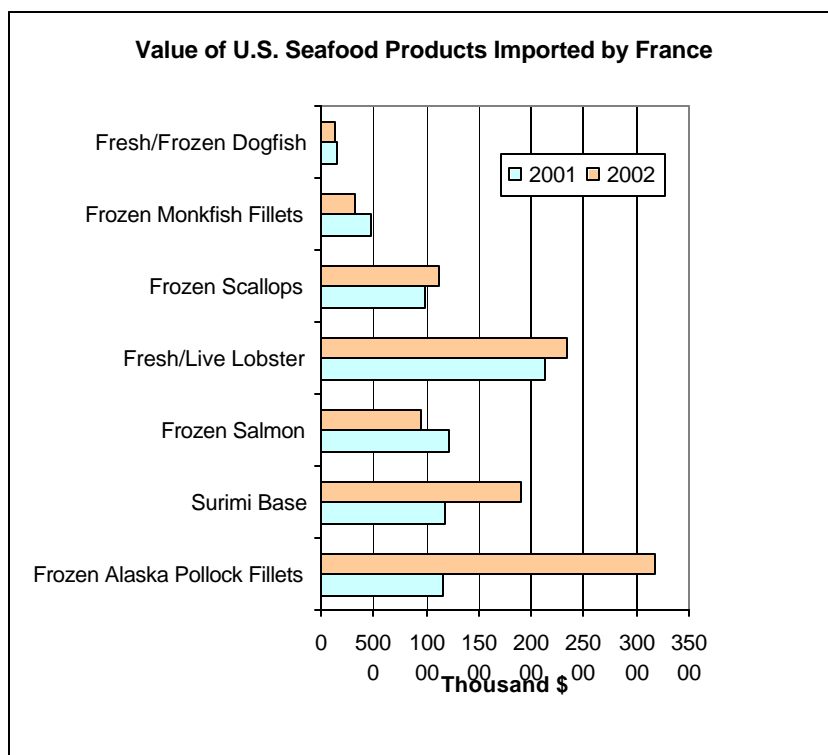
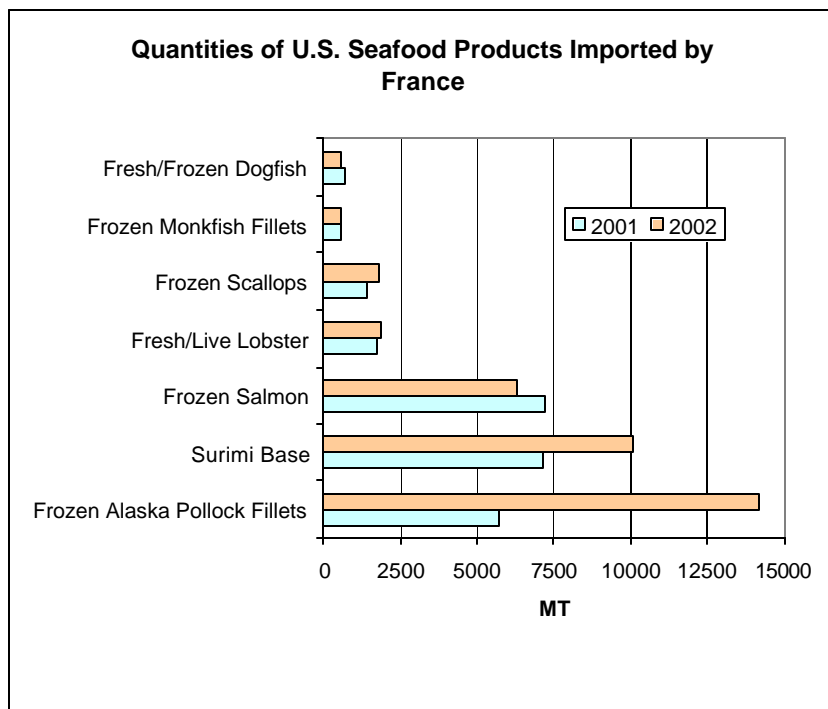
France is a net importer of fishery products, because domestic production (including wild catch and aquaculture) is significantly lower than demand. France is a good market for seafood. With a large population (62 million) and high per capita consumption, French demand cannot be satisfied by domestic production. French per capita consumption is estimated at 27.5 kg per year, average EU per capita consumption is 23.4 kg and average world per capita consumption is 16.1 kg per year.

In 2002, French imports of seafood products totaled 3.33 billion euros and included the following:



The United States is France's fifth leading supplier of seafood products after the UK, Norway, Spain, and the Netherlands, which means that the United States is France's leading seafood supplier outside of Europe. In 2002, the United States' market share on the French market was 5.7%.

As indicated in the graphs below, the main categories of seafood products in quantity imported by France from the United States in 2002 were frozen Alaska pollack fillets, surimi base and frozen salmon. In terms of value, frozen Alaska pollack, fresh/live lobster, surimi base, frozen scallops and frozen salmon are the leading seafood categories exported by the United States to France in 2002.



The French market for Alaska pollack fillets changed significantly in 2002, as U.S. exports doubled from 2001. American product replaced Russian market share, while the Russian product disappeared from the French market. U.S. exports also benefited from the decline in Chinese exports to France, resulting from the EU sanitary restrictions on seafood products from China. However, Chinese pollock fillets are back on the French market in 2003, which may hurt U.S. exports.

The United States is, by far, France's leading supplier of live/fresh lobster, while Canada is France's number one supplier of frozen lobster. Rock lobster is provided mainly by Cuba and the Bahamas. Lobster and rock lobster are considered festive products and their consumption is seasonal in France, most of it taking place during the Holiday season in December.

France is the largest European consumer of surimi, and the French surimi processing industry has significantly increased its production capacity in the past ten years to meet booming domestic demand. The United States is, by far, France's leading supplier of surimi base, which is mainly made from Alaska pollack. Surimi base is processed, flavored and packaged in France by French companies.

France is the largest European market for salmon, which is the French consumer's favorite fish. France is a mature and saturated market for salmon. Norway, Scotland and Ireland are the main suppliers of farm-raised salmon. This product competes with wild Alaska salmon. Price and supply seasonality are the drawbacks of Alaska salmon compared to farm-raised European salmon.

The increase in U.S. exports of frozen scallops started in 2001 and strengthened in 2002. During the first five months of 2003, U.S. exports to France continued to increase. This resulted from the increase in total French imports of scallops in the past few years, and the decline of Peruvian and Chinese exports. Also, the increased availability of scallops from the East coast scallops are increasingly price-competitive on the French market. There is potential for growth of U.S. market share for scallops on the French market.

Note: Websites of interest of the French fishery sector:

<http://www.ofimer.fr>

OFIMER is the French seafood board. Its website contains economic data on French fishery production, consumption and trade.

<http://www.agriculture.gouv.fr>

The website of the French Ministry of Agriculture, Food, Fisheries and Rural Affairs contains general information on French fisheries.

<http://www.savourez-le-saumon.com>

This website was created by the Norwegian, Scottish and Irish salmon promoters, and provide recipes with salmon.

Section II: Statistical Tables

PS&D Tables

PSD Table

Country	France Salmon, Whole/Eviscerated					
Commodity	(MT)					
	2001	Revised Post Estimate [New]	2002 USDA Official [Old]	Estimate Post Estimate [New]	2003 USDA Official [Old]	Forecast Post Estimate [New]
	USDA Official [Old]					
Market Year Begin	01/2001			01/2002		01/2003
Beginning Stocks	32000	32000	32000	32000	31000	30000
Total Production	2	2	2	1	0	0
Intra-EC Imports	85500	92244	85500	90816	0	91500
Other Imports	8000	8295	8000	7153	0	8000
TOTAL Imports	93500	100539	93500	97969	0	99500
TOTAL SUPPLY	125502	132541	125502	129970	31000	129500
Intra-EC Exports	2800	5125	2800	7240	0	6000
Other Exports	350	493	350	640	0	500
TOTAL Exports	3150	5618	3150	7880	0	6500
Domestic Consumption	86352	90923	87352	88090	0	89000
Other Use/Loss	4000	4000	4000	4000	0	4000
TOTAL Utilization	90352	94923	91352	92090	0	93000
Ending Stocks	32000	32000	31000	30000	0	30000
TOTAL DISTRIBUTION	125502	132541	125502	129970	0	129500

PSD Table

Country	France Groundfish, Fillets						UOM
Commodity	(MT)						
	2001	Revised	2002	Estimate	2003	Forecast	
	USDA Official	Post	USDA	Post	USDA	Post	
	[Old]	Estimate	Official	Estimate	Official	Estimate	
Market Year							
Begin		01/2001		01/2002		01/2003	MM/YYYY
Beginning Stocks	1000	1000	1000	1000	1000	1000	(MT)
Total Production	33000	38000	33000	38000	0	38000	(MT)
Intra-EC Imports	85500	91179	85500	83194	0	85000	(MT)
Other Imports	72500	80208	72500	72659	0	75000	(MT)
TOTAL Imports	158000	171387	158000	155853	0	160000	(MT)
TOTAL SUPPLY	192000	210387	192000	194853	1000	199000	(MT)
Intra-EC Exports	14500	15575	14500	13157	0	14000	(MT)
Other Exports	900	1114	900	1073	0	1100	(MT)
TOTAL Exports	15400	16689	15400	14230	0	15100	(MT)
Domestic							
Consumption	174600	191698	174600	178623	0	181900	(MT)
Other Use/Loss	1000	1000	1000	1000	0	1000	(MT)
TOTAL Utilization	175600	192698	175600	179623	0	182900	(MT)
Ending Stocks	1000	1000	1000	1000	0	1000	(MT)
TOTAL							
DISTRIBUTION	192000	210387	192000	194853	0	199000	(MT)

PSD Table

Country	France					
Commodity	Lobster (MT)					
	2001 USDA Official [Old]	Revised Post Estimate [New]	2002 USDA Official [Old]	Estimate Post Estimate [New]	2003 USDA Official [Old]	Forecast Post Estimate [New]
Market Year Begin	01/2001		01/2002		01/2003	
Beginning Stocks	100	100	100	100	100	100
Total Production	400	391	400	416	0	400
Intra-EC Imports	2900	2919	2900	2672	0	2800
Other Imports	6200	5915	6200	5549	0	5600
TOTAL Imports	9100	8834	9100	8221	0	8400
TOTAL SUPPLY	9600	9325	9600	8737	100	8900
Intra-EC Exports	500	1106	500	508	0	700
Other Exports	300	333	300	369	0	350
TOTAL Exports	800	1439	800	877	0	1050
Domestic Consumption	8699	7786	8700	7760	0	7750
Other Use/Loss	1	0	0	0	0	0
TOTAL Utilization	8700	7786	8700	7760	0	7750
Ending Stocks	100	100	100	100	0	100
TOTAL DISTRIBUTION	9600	9325	9600	8737	0	8900

PSD Table

Country	France					
Commodity	Scallops (MT)					
	2001 USDA Official [Old]	Revised Post Estimate [New]	2002 USDA Official [Old]	Estimate Post Estimate [New]	2003 USDA Official [Old]	Forecast Post Estimate [New]
Market Year Begin	01/2001		01/2002		01/2003	
Beginning Stocks	1600	1600	1500	1500	1500	1500
Total Production	13000	16908	13000	19388	0	19000
Intra-EC Imports	8000	9297	8000	7584	0	8000
Other Imports	7500	8258	7500	9254	0	9000
TOTAL Imports	15500	17555	15500	16838	0	17000
TOTAL SUPPLY	30100	36063	30000	37726	1500	37500
Intra-EC Exports	3100	4533	3100	4818	0	4700
Other Exports	100	134	100	171	0	150
TOTAL Exports	3200	4667	3200	4989	0	4850
Domestic Consumption	25390	29886	25290	31227	0	31140
Other Use/Loss	10	10	10	10	0	10
TOTAL Utilization	25400	29896	25300	31237	0	31150
Ending Stocks	1500	1500	1500	1500	0	1500
TOTAL DISTRIBUTION	30100	36063	30000	37726	0	37500

PSD Table

Country	France					
Commodity	Surimi					
	(MT)					
	2001 USDA Official [Old]	Revised Post Estimate [New]	2002 USDA Official [Old]	Estimate Post Estimate [New]	2003 USDA Official [Old]	Forecast Post Estimate [New]
Market Year Begin	01/2001		01/2002		01/2003	
Beginning Stocks	0	0	0	0	0	0
Total Production	0	2000	0	2000	0	3000
Intra-EC Imports	0	1128	0	83	0	100
Other Imports	0	10019	0	14741	0	15000
TOTAL Imports	0	11147	0	14824	0	15100
TOTAL SUPPLY	0	13147	0	16824	0	18100
Intra-EC Exports	0	968	0	324	0	350
Other Exports	0	15	0	235	0	250
TOTAL Exports	0	983	0	559	0	600
Domestic Consumption	0	12164	0	16265	0	17500
Other Use/Loss	0	0	0	0	0	0
TOTAL Utilization	0	12164	0	16265	0	17500
Ending Stocks	0	0	0	0	0	0
TOTAL DISTRIBUTION	0	13147	0	16824	0	18100

Note: Data in the above PS&D were revised so that all data are for surimi base, and not prepared surimi products.

Trade Matrices

Salmon

Import Trade Matrix

Country	France Salmon,	
Commodity	Whole/Eviscerated	
Time period	Jan-Dec	Units: MT
Imports for:	2001	2002
U.S.	7621	6291
Others	Others	
UK	29029	Denmark 27750
Denmark	26284	UK 26211
Sweden	10890	Sweden 14010
Ireland	9100	Ireland 9582
Germany	11865	Germany 8177
Spain	2260	Spain 2873
Belgium	1262	Netherlands 1234
Netherlands	1121	Belgium 840
Canada	646	Chile 337
Chile	71	Canada 214
Total for Others	92528	91228
Others not Listed	390	450
Grand Total	100539	97969

Export Trade Matrix

Country	France Salmon,	
Commodity	Whole/Eviscerated	
Time period	Jan-Dec	Units: MT
Exports for:	2001	2002
U.S.	0	0
Others	Others	
Spain	1613	Spain 4270
Belgium	1028	Belgium 1081
Germany	902	Germany 463
Italy	567	Italy 445
Total for Others	4110	6259
Others not Listed	1508	1621
Grand Total	5618	7880

The most recent data available is for May 2003. The salmon import trade matrix for the January-May period is the following:

Import Trade Matrix

Country	France Salmon,		
Commodity	Whole/Eviscerated		
Time period	Jan-May	Units:	MT
Imports for:	2002		2003
U.S.	1987	U.S.	1704
Others		Others	
Denmark	10241	UK	10689
UK	9826	Denmark	8082
Ireland	4814	Sweden	7385
Sweden	4555	Ireland	2581
Germany	3297	Germany	1924
Spain	1029	Spain	931
Netherlands	454	Netherlands	347
Chile	290	Belgium	159
Belgium	173	Canada	158
Total for Others	34679		32256
Others not Listed	390		152
Grand Total	37056		34112

Groundfish Fillets

Import Trade Matrix

Country	France		
Commodity	Groundfish, Fillets		
Time period	Jan-Dec	Units:	MT
Imports for:	2001		2002
U.S.	8653	U.S.	16886
Others	Others		
Germany	24312	Germany	21956
Netherlands	20372	Netherlands	18036
China	21028	Denmark	17009
Denmark	19464	China	11731
UK	10095	UK	9031
Russia	8429	Chile	8877
Belgium	8032	Belgium	6196
New Zealand	6334	Iceland	6041
Iceland	5668	Spain	6016
Spain	5544	New Zealand	5234
Total for Others	129278		110127
Others not Listed	33456		28840
Grand Total	171387		155853

Export Trade Matrix

Country	France		
Commodity	Groundfish, Fillets		
Time period	Jan-Dec	Units:	MT
Exports for:	2001		2002
U.S.	0	U.S.	0
Others	Others		
Germany	3295	Germany	2955
Belgium	3262	Belgium	2681
Italy	2693	Italy	1583
UK	1945	UK	1386
Spain	1592	Spain	1246
		Denmark	1032
Total for Others	12787		10883
Others not Listed	3902		3347
Grand Total	16689		14230

French imports of Alaska Pollack frozen fillets and frozen meat:

French Imports Frozen Alaska Pollack (MT)	CY 2001		CY 2002	
	Frozen Fillets (03042085)	Frozen Meat (03049061)	Frozen Fillets (03042085)	Frozen Meat (03049061)
US	5734	2175	14189	2632
China	16903	1340	9848	827
Germany	10471	566	9445	342
Russia	8068	1096	3248	285
UK	730	507	803	4
Denmark	1252	167	580	4
Netherlands	1527	0	476	237
Others				
Total	45178	5853	39033	4339

The most recent data available is for May 2003. The groundfish fillet import trade matrix for the January-May period is the following:

Import Trade Matrix

Country	France		
Commodity	Groundfish, Fillets		
Time period	Jan-May	Units:	MT
Imports for:	2002		2003
U.S.	7265	U.S.	5562
Others	Others		
Germany	10838	Denmark	9610
Netherlands	7552	Germany	8144
Denmark	7126	Netherlands	7862
China	5244	China	7300
UK	4195	UK	4447
Chile	3346	Spain	3391
Iceland	2692	Chile	3318
Belgium	2528	Belgium	2735
New Zealand	2348	New Zealand	2425
Spain	2265	Russia	2351
Total for Others	48134		51583
Others not Listed	11685		15812
Grand Total	67084		72957

French imports of Alaska Pollack frozen fillets and frozen meat in Jan-May 2002 and Jan-May 2003:

French Imports Frozen Alaska Pollack (MT)	Jan-May 2002		Jan-May 2003	
	Frozen Fillets (03042085)	Frozen Meat (03049061)	Frozen Fillets (03042085)	Frozen Meat (03049061)
US	6484	1050	4337	832
China	4291	549	6229	71
Germany	4515	67	3527	363
Russia	854	28	2152	841
UK	523	4	977	0
Denmark	347	4	344	33
Others	513	1	142	0
Total	17527	1703	17708	2140

Lobster**Import Trade Matrix**

Country	France		
Commodity	Lobster		
Time period	Jan-Dec	Units:	MT
Imports for:	2001		2002
U.S.	2084	U.S.	2006
Others	Others		
Canada	2103	Canada	1690
Spain	1278	Spain	1167
Bahamas	685	Bahamas	857
UK	680	UK	777
Ireland	606	Ireland	434
Belgium	255	Belgium	212
Cuba	237	Cuba	194
Total for Others	5844		5331
Others not Listed	906		884
Grand Total	8834		8221

Export Trade Matrix

Country	France		
Commodity	Lobster		
Time period	Jan-Dec	Units:	MT
Exports for:	2001		2002
U.S.	1	U.S.	9
Others	Others		
Italy	499	Japan	326
Japan	273	Spain	118
Spain	149	Italy	113
Luxemburg	177	Belgium	94
Belgium	113	Germany	81
Total for Others	1211		732
Others not Listed	227		163
Grand Total	1439		904

The most recent data available is for May 2003. The lobster import trade matrix for the January-May period is the following:

Import Trade Matrix

Country	France		
Commodity	Lobster		
Time period	Jan-May	Units:	MT
Imports for:	2002		2003
U.S.	490	U.S.	436
Others		Others	
Canada	273	Canada	239
UK	237	Bahamas	178
Ireland	205	UK	161
Bahamas	121	Spain	117
Spain	96		
Total for Others	932		695
Others not Listed	274		522
Grand Total	1696		1653

Scallops**Import Trade Matrix**

Country	France		
Commodity	Scallops		
Time period	Jan-Dec	Units:	MT
Imports for:	2001		2002
U.S.	1460	U.S.	1698
Others	Others		
UK	3973	UK	3419
Denmark	3199	Argentina	2237
Chile	1921	Denmark	1986
Canada	1555	Canada	1885
Argentina	1553	Chile	1621
Netherlands	1397	Netherlands	1272
Peru	715	Peru	652
New Zealand	501	Ireland	483
Total for Others	14814		13555
Others not Listed	1281		1585
Grand Total	17555		16838

Export Trade Matrix

Country	France		
Commodity	Scallops		
Time period	Jan-Dec	Units:	MT
Exports for:	2001		2002
U.S.	0	U.S.	0
Others	Others		
Spain	2440	Spain	2317
Italy	1081	Italy	1629
Belgium	451	Belgium	358
UK	215	Netherlands	196
Germany	164	Germany	113
Netherlands	95	UK	99
Total for Others	4446		4712
Others not Listed	221		277
Grand Total	4667		4989

The most recent data available is for May 2003. The scallop import trade matrix for the January-May period is the following:

Import Trade Matrix

Country	France		
Commodity	Scallops		
Time period	Jan-May	Units:	MT
Imports for:	2002		2003
U.S.	605	U.S.	732
Others	Others		
UK	1105	UK	1791
Argentina	916	Argentina	1185
Netherlands	668	Chile	688
Chile	648	Canada	532
Denmark	563	Denmark	434
New Zealand	233	Vietnam	330
Peru	231	Peru	312
Ireland	236	Netherlands	287
Total for Others	4600		5559
Others not Listed	677		689
Grand Total	5882		6980

Surimi**Import Trade Matrix**

Country	France		
Commodity	Surimi		
Time period	Jan-Dec	Units:	MT
Imports for:	2001		2002
U.S.	7128	U.S.	10109
Others	Others		
Thailand	1748	Chile	3139
Belgium	1657	Belgium	2837
Chile	1448	Thailand	1512
South Korea	1286	South Korea	1231
China	1232	Argentina	586
Denmark	1023	China	399
Argentina	977	Peru	368
Peru	327	Canada	309
		Netherlands	171
Total for Others	9698		10552
Others not Listed	408		249
Grand Total	17234		20910

Export Trade Matrix

Country	France		
Commodity	Surimi		
Time period	Jan-Dec	Units:	MT
Exports for:	2001		2002
U.S.	0	U.S.	0
Others	Others		
Spain	2442	Spain	1484
UK	143	Lithuania	173
		UK	152
Total for Others	2585		1809
Others not Listed	365		428
Grand Total	2950		2237

French imports of surimi were broken down as follows in CY 2001 and CY 2002:

French Imports of Surimi	Surimi Base 03049005		Prepared Surimi 16042005		Total	
	CY 2001	CY 2002	CY 2001	CY 2002	CY 2001	CY 2002
United States	7127	10105	0	4	7128	10109
Chile	1448	3139	0	0	1448	3139
Belgium	38	25	1619	2812	1657	2837
Thailand	19	237	1729	1275	1748	1512
South Korea	0	0	1286	1231	1286	1231
Argentina	977	586	0	0	977	586
China	0	0	1232	399	1232	399
Peru	326	368	1	0	327	368
Belgium				2812		
Others	1212	364	227	549	1431	729
Total	11147	14824	6094	6082	17234	20910

The most recent data available is for May 2003. The surimi import trade matrix for the January-May period is the following:

Import Trade Matrix

Country	France		
Commodity	Surimi		
Time period	Jan-May	Units:	MT
Imports for:	2002		2003
U.S.	4309	U.S.	3660
Others	Others		
Chile	1057	Belgium	1972
Belgium	656	Chile	1789
South Korea	523	Thailand	501
Thailand	438	South Korea	391
China	399	Argentina	299
Peru	176		
Total for Others	3249		4952
Others not Listed	222		347
Grand Total	7780		8959

Monkfish

French Imports of Monkfish (Jan-Dec, MT)	2001	2002
U.S.	968	1250
UK	3029	3849
Ireland	798	652
Brazil	253	341
Spain	278	311
Others	2152	894
Total	7478	7297

French Imports Monkfish (MT)	Jan-May 2002	Jan-May 2003
U.S.	569	500
UK	1753	1742
China	88	360
Brazil	92	231
Ireland	236	214
Netherlands	69	212
Spain	64	191
Others	160	537
Grand Total	3031	3756

Dogfish

French Imports of Dogfish (Jan-Dec, MT)	2001	2002
U.S.	682	543
Canada	779	916
UK	1108	802
Spain	423	588
Others	1782	1651
Total	4774	4500

French Imports Dogfish (MT)	Jan-May 2002	Jan-May 2003
U.S.	174	44
UK	395	504
Spain	261	433
Canada	320	346
Germany	152	243
Others	580	565
Grand Total	1882	2135

Tariff Tables

Customs Codes Fresh/Frozen Whole Salmon	Tariffs 2003
03 02 12	2
03 02 19	8
03 03 11	2
03 03 19	2
03 03 22	2
03 03 29	9

Customs Codes Groundfish Fillets	Tariffs 2003
03 04 10 13	2
03 04 10 15	12
03 04 10 17	12
03 04 10 19	9
03 04 10 31	18
03 04 10 33	18
03 04 10 35	18
03 04 10 38	18
03 04 10 91	8
03 04 10 97	(*)
03 04 10 98	(*)
03 04 20 13	2
03 04 20 15	12
03 04 20 17	12
03 04 20 19	9
03 04 20 21 to 03 04 20 43	7.5
03 04 20 45	18

03 04 20 51	15
03 04 20 53	15
03 04 20 55 to 03 04 20 73	7.5
03 04 20 75 to 03 04 20 85	15
03 04 20 87	7.5
03 04 20 88	15
03 04 20 91	7.5
03 04 20 95	15(**)

(*) Jan 1st-Feb 14, and June 16-Dec 31: TRQ of 34,000 MT, for reference priced :

03 02 40 00
03 03 50 00
03 04 10 97
03 04 10 98
03 04 90 22

(**)TRQ of 200 MT

Customs Codes Lobster	Tariffs 2003
03 06 11 10	12.5
03 06 11 90	12.5
03 06 12 10	6
03 06 12 90	16
03 06 21 00	12.5
03 06 22 10	8
03 06 22 91	8
03 06 22 99	10

Customs Codes Scallops	Tariffs 2003
03 07 21 00	8
03 07 29 10	8
03 07 29 90	8

Customs Codes Surimi	Tariffs 2003
03 04 90 05	15
16 04 20 05	20

Customs Codes Monkfish	Tariffs 2003
03 02 69 81	15
03 03 79 81	15
03 04 20 83	15
03 04 90 57	7.5

Customs Codes Dogfish	Tariffs 2003
03 02 65 20	6
03 02 65 50	6
03 02 65 90	8
03 03 75 20	6
03 03 75 50	6
03 03 75 90	8
03 04 20 61	7.5
03 04 20 69	7.5

Section III: Production, Supply and Demand

Production

Total Fishery Products

The most recent complete data available on French seafood and aquaculture production from the French Ministry of Agriculture and Fisheries (MinAg) and the French Seafood board (OFIMER) is for 2001. It includes the following:

	2000		2001	
	Quantity (MT)	Value (million Euros)	Quantity (MT)	Value (million Euros)
Fresh Wild Catch Sold at Auction Markets	293,983	684	307,981	704
Fresh Wild Catch not Sold at Auction Markets	83,707	176	95,002	206
Aquaculture	269,409	471	254,020	483
Frozen Wild Catch	219,603	156	203,474	160
TOTAL	866,702	1,487	860,477	1,552

Sources: OFIMER, MinAg

To date, only sales at auction markets are available for 2002. They included the following:

	2001			2002		
	Quantity (MT)	Value (million Euros)	Average Price (Euro per kg)	Quantity (MT)	Value (million Euros)	Average Price (Euro per kg)
Finfish	231,965	533	2.30	217,632	525	2.41
Crustaceans	10,502	64	6.14	10,431	69	6.59
Shellfish	28,667	54	1.90	30,332	54	1.80
Cephalopods	18,287	51	2.80	23,066	62	2.69

Source: OFIMER

Canned Fishery Products

France is a major producer of canned fishery products. As indicated in the following table, the major species canned in France are tuna, sardines and mackerel.

	2001		2002	
	Raw material used (whole fish equivalent, MT)	Processed Products (net weight, MT)	Raw material used (whole fish equivalent, MT)	Processed Products (net weight, MT)
Sardines	18,328	10,798	15,774	9,956
Tuna	43,031	47,653	39,960	43,005
Mackerel	36,120	21,289	33,885	21,305
Other (incl. Herring, salmon, shellfish and other)	4,594	8,408	6,241	9,187
Total	102,073	88,148	95,860	83,453

Source: FIAC (French Federation for the Canning Industry)

<http://www.adepale.org>

Salmon

French salmon production is marginal. The only company currently producing farmed salmon is SaumonFrance Cherbourg, located in Normandy. The company belongs to the Norwegian group Inaq. In 2003, salmon production amounted to 400 MT, and 900 MT are expected in 2004. Most of the production is sold fresh, whole, salted and gutted. This salmon is sold at higher prices than the market average because it is very fresh.

While salmon production is marginal in France, there is a significant production of trout through aquaculture. Trout is the leading species produced in France by aquaculture. Salmon and trout products are in direct competition on the French market. Since salmon and trout belong to the same family (Salmonidae), the aspect and texture of their meat are close. Also, salmon and trout are both sold fresh and smoked on the French market. In 2001, French trout production amounted to 45,000 MT, which is significantly lower than the 100,600 MT of salmon imported.

Groundfish

According to the French Ministry of Agriculture, Food, Fisheries and Rural Affairs, the following quantities of groundfish were caught by French boats in 2000, 2001 and 2002:

	2000		2001		2002	
	Quantities Produced (MT)	Sales Value (1,000 Euros)	Quantities Produced (MT)	Sales Value (1,000 Euros)	Quantities Produced (MT)	Sales Value (1,000 Euros)
Cod	11,886	29,986	11,308	30,142	11,661	28,292
Haddock	4,381	5,573	5,989	7,705	5,885	7,403
Pollack	26,942	24,468	28,754	26,855	30,149	26,832
Whiting	35,105	29,493	38,535	31,018	33,168	30,966
Hake	11,637	45,756	10,000	38,528	13,585	50,174
TOTAL	89,951	131,976	94,586	134,248	94,448	143,667

Lobster

According to the French MinAg, French production of lobster was the following in 2000, 2001 and 2002:

	2000		2001		2002	
	Quantities Produced (MT)	Sales Value (1,000 Euros)	Quantities Produced (MT)	Sales Value (1,000 Euros)	Quantities Produced (MT)	Sales Value (1,000 Euros)
Lobster	332	6,714	332	6,763	362	7,259
Rock Lobster	72	2,284	59	2,117	54	1,967
TOTAL	404	8,998	391	8,880	416	9,226

Scallops

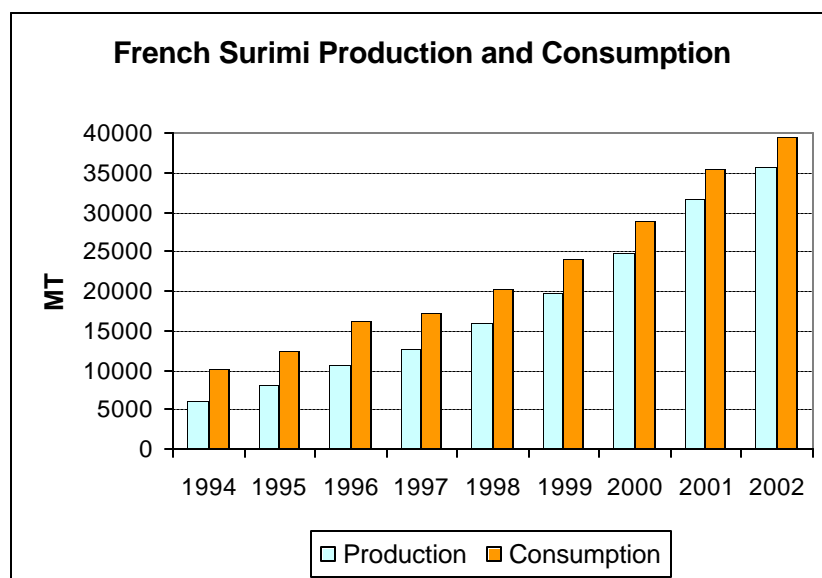
French scallop production was the following:

Scallops	2000		2001		2002	
	Quantities Produced (MT)	Sales Value (1,000 Euros)	Quantities Produced (MT)	Sales Value (1,000 Euros)	Quantities Produced (MT)	Sales Value (1,000 Euros)
in-shell scallops	13,745	44,128	16,903	50,946	19,388	51,359
shelled equivalent	2,201		2,486		2,851	

Note: the conversion factor used to convert in-shell scallop production into shelled scallop production is 6.8.

Surimi

According to the French surimi development association (ADISUR), French domestic production of surimi continued to increase in 2002 to 35,600 MT (a 13% increase from 2001), responding to the growing domestic consumption, which was estimated at 39,400 MT. The following graph illustrates the continuing growth in both French domestic production and demand for surimi since 1994.



This information is available on ADISUR's website: <http://www.alesial.org/21.htm>

Monkfish and Dogfish

According to the French MinAg, French production of monkfish and dogfish was the following in 2000, 2001 and 2002:

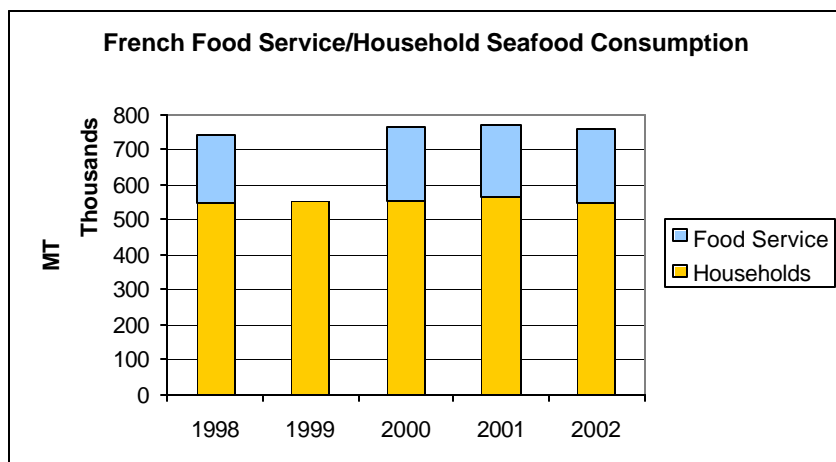
	2000		2001		2002	
	Quantities Produced (MT)	Sales Value (1,000 Euros)	Quantities Produced (MT)	Sales Value (1,000 Euros)	Quantities Produced (MT)	Sales Value (1,000 Euros)
Monkfish	13,056	62,703	13,566	61,540	15,376	68,632
Dogfish	14,729	15,472	14,270	15,193	12,186	13,235

Consumption

Total Fishery Products

According to the French Seafood Board (OFIMER) and surveys conducted by the GIRA and SECODIP agencies on French food service and household seafood consumption, respectively, total consumption of seafood declined by 1% from 2001 to 2002. The decline suggests the BSE effect is fading as the French consumer's fear of BSE had boosted seafood consumption in 2001.

The 1% decline in total seafood consumption in 2002 was mainly due to the 3% decline in household purchases, partially offset by the 5% increase in food service consumption. The following graph illustrates the trend in French seafood consumption in the HRI sector and by French households. Since 1998, food service consumption has accounted for 26.5% to 28.5% of total seafood consumption.



Note: HRI data was not available for 1999

According to OFIMER, French household and HRI consumption of total fishery products was broken down as follows in 2001 and 2002 (in MT):

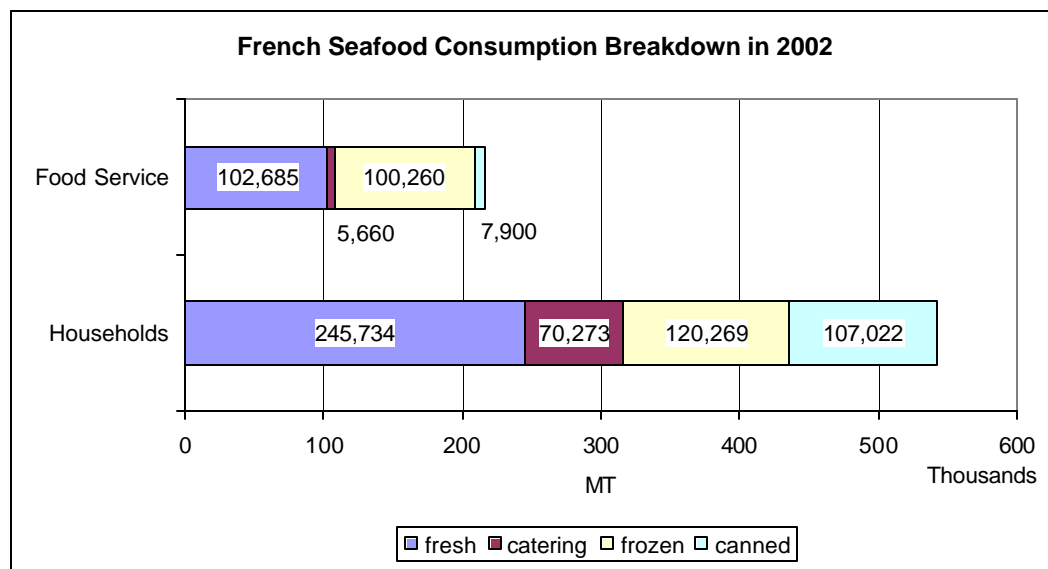
		Households 2002		HRI 2002		Total 2002	Total 2001 (2)
		Supermarket s	Other (1)	Hotels/Rest aurants	Institutio ns		
Whole Finfish	Fresh	28,979	21,990	23,900	1,765	76,633	80,322
	Frozen	2,609	0	5,400	965	8,974	9,417
Finfish Cuts	Fresh	61,183	19,410	11,060	12,480	104,133	101,534
	Frozen	61,281	0	17,450	52,170	130,901	123,662
Crustacea ns	Fresh	23,404	9,736	8,100	430	41,670	38,272
	Frozen	10,113	0	4,030	1,700	15,843	16,384
Shellfish	Fresh	45,027	31,818	41,495	2,200	120,539	135,295
	Frozen	3,976	0	7,280	2,600	13,856	13,601
Cephalop ods	Fresh	2,766	1,422	675	580	5,443	4,929
	Frozen	2,314	0	780	1,700	4,794	5,691
Catering/ Prepared Seafood	Fresh	67,662	2,611	4,360	1,300	75,934	72,650
	Frozen	39,977	0	2,155	4,030	46,162	45,334
Canned		105,673	1,349	2,370	5,530	114,922	120,688
Total Fishery Products	Fresh	161,359	84,375	85,230	17,455	348,418	360,352
	Caterin g/Prepa red Seafoo d	67,662	2,611	4,360	1,300	75,934	72,650
	Frozen	120,269	0	37,095	63,165	220,529	214,089
	Canned	105,673	1,349	2,370	5,530	114,922	120,688
	TOTAL	454,962	88,336	129,055	87,450	759,803	767,779

Source: OFIMER, GIRA, SECODIP

Note (1): Other retailers than supermarkets include freezer centers, street markets, specialized fish shops and direct sales.

Note (2): For full detail of 2001 consumption, see report FR2068, dated 10/01/2002

In 2002, French seafood consumption was broken down as follows:



The market for frozen seafood products, which is of interest to U.S. exporters, represented 22% of French households purchases and 46% of food service purchases.

Salmon

France is the largest European consumer and importer of salmon. Salmon products (fresh, frozen, and processed) represent 10 percent of the volume of finfish consumed in France every year. French per capita consumption is 2 kilograms per year, whole salmon equivalent. The French principally consume salmon fresh or smoked.

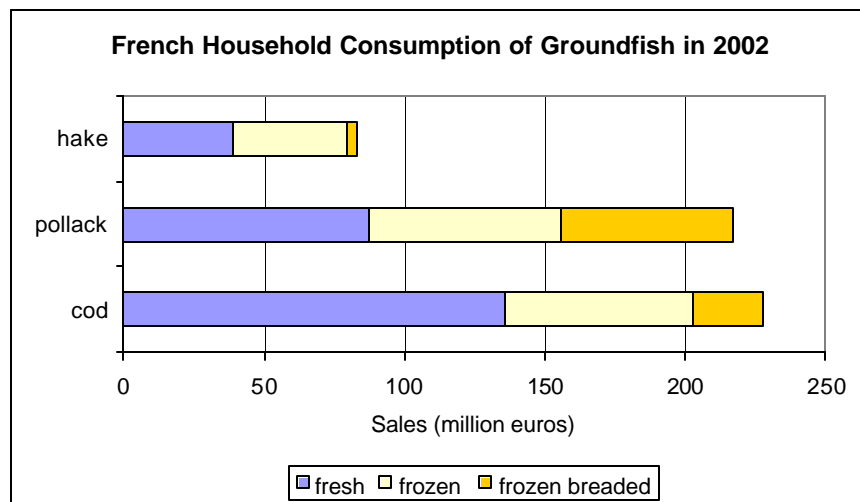
In 2002, French household purchases of fresh and smoked salmon were stable in quantity and value from 2001, despite lower prices. This indicates that the French market for salmon is mature and saturated. In 2002, salmon represented 16% (215 million euros) of French household purchases of fresh finfish, in value, before cod (10%), whiting (7%), pollack (6%), sole (6%), and monkfish (5%). At the same time, salmon accounted for 75 percent (273 million euros) of French household purchases of smoked finfish, far ahead of smoked trout (0.9 percent). Finally, frozen salmon purchases in 2002 increased by 3% from 2001.

Most French household purchase salmon in supermarkets: in 2002 this represented 84% of the sales for a value of 175 million euros. Most of the Alaska salmon on the French market is sold in HRI sector.

The success of salmon on the French market is principally due to the price decline of the past decade, as a result of the increased salmon farming in Norway, Scotland and Ireland. In addition, salmon products sold on the French market are numerous, including various cuts (whole, steaks, fillets), and processing (fresh, frozen, smoked, marinated, carpaccio). Salmon products on the French market are therefore in direct competition with groundfish fillets, as well as meat and poultry cuts.

Groundfish Fillets

Groundfish fillets compete on the French market with salmon, poultry and meat cuts. Cod and pollack are the most popular species in French households, as indicated in the graph below:



Of interest for U.S. exporters is frozen Alaska pollack, imports of which increased significantly in 2002. As indicated in the above graph, frozen products represented 60% of French households purchases of pollack in 2002. Sales of frozen pollack increased by 3% in 2002, while sales of frozen breaded pollack increased by 1%.

Lobster

Lobster is mainly consumed in the HRI sector in France, as it is a luxury product not often prepared at home. It is principally consumed in December during the Holiday Season. Canadian lobster and American lobster compete for French market, but U.S. lobster is mainly imported fresh, while Canadian lobster is principally imported frozen. In 2002, French household consumption of fresh lobster and rock lobster was 1,433 MT (an increase of 17% from 2001), for a value of 44 million euros (an increase of 22%).

Scallops

In France, the market for scallops is segmented into the fresh and the frozen markets. Fresh scallops go to the HRI sector (40 percent), supermarkets (30 percent), and specialized fish shops (30 percent). Fresh scallops are mainly consumed in December as a festive product. In 2002, French households purchased 5,499 MT of fresh in-shell scallops (up 4 percent from 2000) and 944 MT of fresh-shelled scallops (down 12 percent from 2000).

The total French market for frozen scallops is estimated at 75,000 MT in-shell scallop equivalent, i.e., 11,000 MT unshelled. Half of this is processed into prepared meals with scallops, a third is sold in supermarket chains, and the remainder is sold to the HRI sector.

Surimi

France is the largest European consumer of surimi, ahead of number 2 Spain. As indicated in the Production section of this report, French surimi consumption continues to increase significantly, and amounted to 39,430 MT in 2002. It included 24,564 MT purchased by French households, for a value of 191 million euros. Surimi sticks represent 75% of the household purchases.

Trade

Salmon

In 2002, French imports of salmon from the United States declined by 17%, and went back to their 2000 levels. In 2002, French imports of salmon from the United States included 90% frozen whole Pacific salmon (030319) and 10% frozen Sockeye salmon (030311). Part of the decline in U.S. shipments to France can be traced to U.S. tendency to offer whole salmon, while the French market demands fillets and cuts. The U.S. market share declined from 7.6% in 2001 to 6.4% in 2002. A slight decline was also recorded during the first five months of 2003 compared to the same period in 2002. In 2003, one French importer stated he plans to import a significant amount of fresh Alaska salmon to be sold in a major supermarket chain.

French imports from Denmark and Sweden that appear in the trade matrices are transshipments through these countries from Norway. Norwegian and Scottish products are the main competitors of U.S. salmon on the French market. There are also some direct shipments of salmon from Chile. In 2002, French salmon imports from Chile increased significantly, but Chile remained a marginal supplier to France compared to Norway, Scotland, Ireland and Alaska.

Groundfish Fillets

In 2002, French imports of groundfish fillets from the United States almost doubled, 84 percent of which were Alaska pollack fillets. The American product took over Russian market share. This resulted from the a change in Russian production practices from pollack fillets to headed and gutted pollack.

The jump in U.S. exports in 2002 also resulted from the decline in Chinese exports to France, resulting from veterinary/sanitary restrictions from the EU. However, the Chinese product is back on the EU and French markets for 2003, as the sanitary restrictions on Chinese seafood are now lifted: shipments of groundfish fillets from China increased by 40% in the first five months of 2003. Also, French imports of groundfish fillets from Russia have recovered significantly in Jan-May 2003. As a result, U.S. exports to France declined by 23% during that period, although the United States remained France's fifth leading supplier of groundfish fillets.

Lobster

French imports of lobster in the trade matrix were broken down as follows in CY 2002:

	Live/Fresh Lobster (030622)	Frozen Lobster (030612)	Frozen Rock Lobster (030611)	Live/Fresh Rock Lobster (030621)	TOTAL LOBSTER
Total	3486	1209	2948	577	8220
United States	1852	1	142	11	2006
Canada	672	1018	0	0	1690
Spain	3	2	1095	68	1168
Bahamas	0	0	857	0	857
UK	534	84	150	9	777
Ireland	244	35	144	11	434
Belgium	26	55	130	1	212
Cuba	0	0	75	119	194

his table clearly indicates that the United States is, by far, the leading supplier of live and fresh lobster to France, while Canada is the number one supplier of frozen lobster to France. Frozen and live/fresh rock lobster are mainly supplied by the Bahamas and Cuba to France, either directly or through Spain.

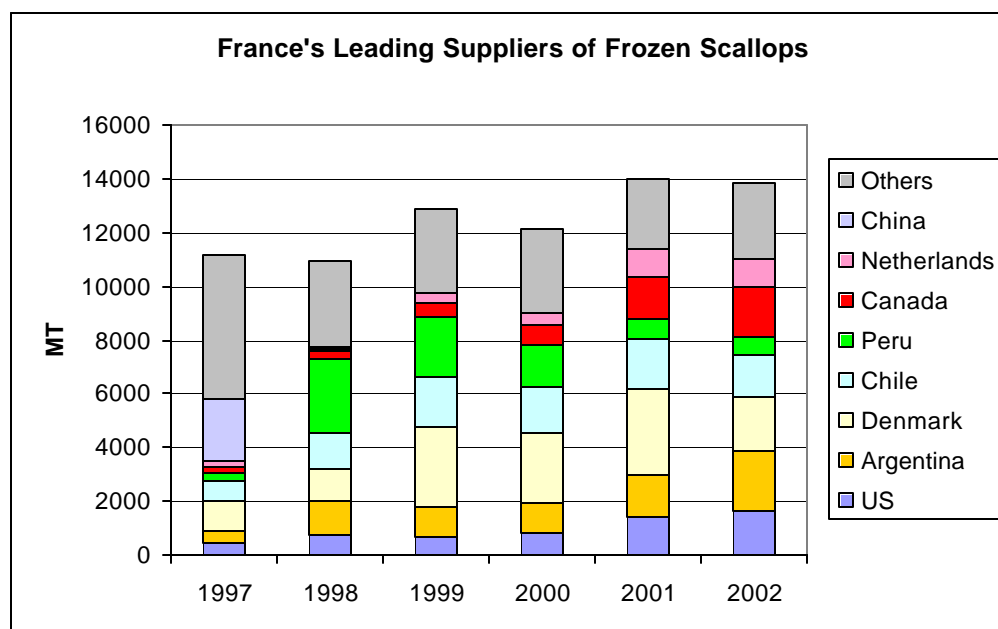
American and Canadian lobsters are very price-competitive on the French market with lobster caught in France, the UK and Ireland.

Scallops

French imports of scallops in the trade matrix were broken down as follows in 2002 (in MT):

	Live/Fresh Scallops (030721)	Frozen Scallops (030729)	TOTAL SCALLOPS
Total	2953	13873	16826
US	40	1658	1698
UK	2416	1001	3417
Argentina	0	2236	2236
Denmark	2	1983	1985
Canada	38	1845	1883
Chile	55	1568	1623
Netherlands	202	1069	1271
Peru	0	651	651
Ireland	171	310	481

This table indicates that the United States is France's fourth leading supplier of frozen scallops, after Argentina, Denmark, and Canada. In the past five years, U.S. exports of frozen scallops to France have boomed, as indicated in the graph below:

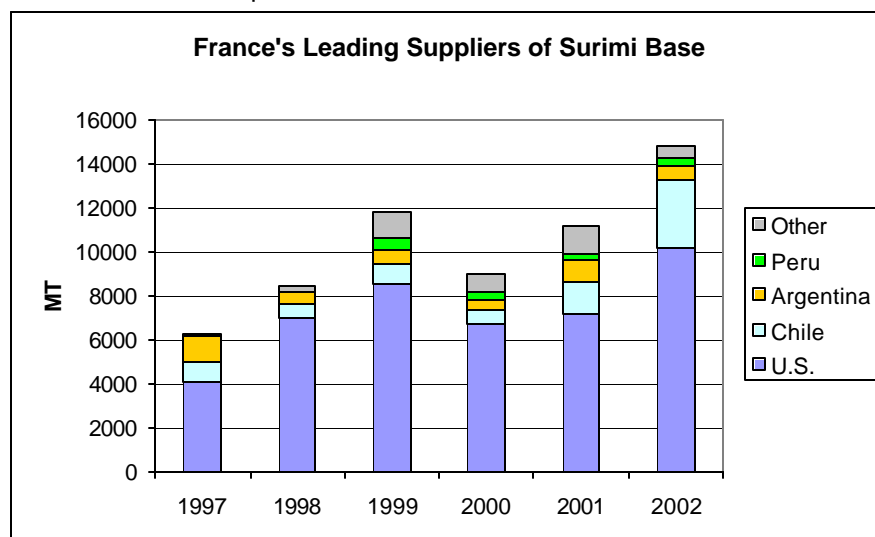


This graph indicates that since 1997, French imports of frozen scallops have gradually increased by almost 3,000 MT. Most of this increase has been filled by rising shipments from the United States, Argentina, Chile, and Canada. By contrast, Chinese products have disappeared from the French market, due to sanitary restrictions, and imports from Peru have declined significantly.

During the first five months of 2003, U.S. exports of frozen scallops to France continued to increase. The U.S. market share is growing on the good prices and availability of scallops on the East Coast of the United States.

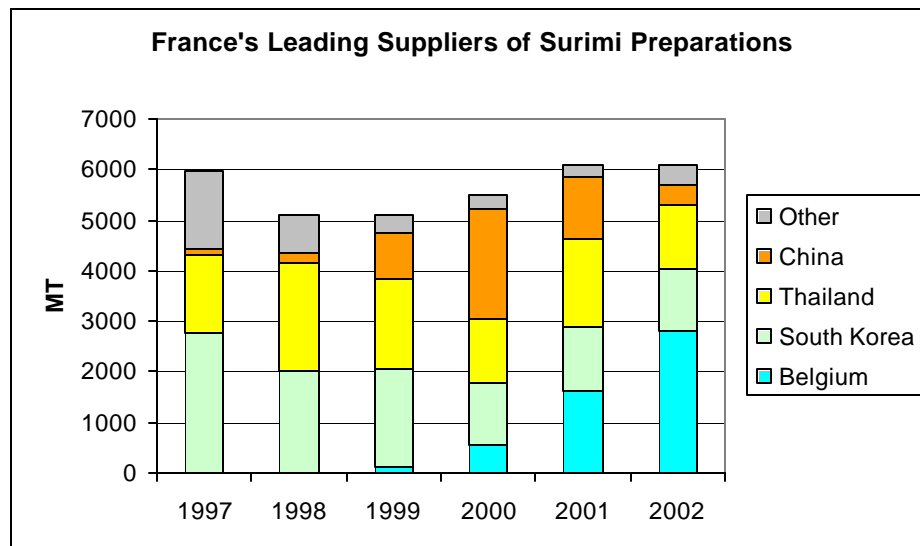
Surimi

The United States is, by far, France's leading supplier of surimi base, which is principally made from Alaska pollack.



Surimi base imported by France from the United States is processed, flavored and packaged in France by French processors. However, there are no shipments of surimi preparations

from the United States to France. The bulk of surimi preparations imported by France come from China, Thailand and South Korea, either directly or through Belgium.



Although Lithuania and Estonia don't directly appear in French import data, shipments of surimi preparations from these countries through Belgium took place in recent years. These were shipments from the Lithuanian company VICIUNAI, also present in Estonia, which is the world's largest surimi processing plant: its surimi production capacity is estimated at 60,000 MT in 2003. VICIUNAI exports to Spain, Portugal and Italy. In France, to date, VICIUNAI products are limited to supermarket-branded products. These products are in direct competition with products sold under French brands and processed from U.S. surimi base.

Marketing

Trade Shows

- European Seafood Exposition, Brussels

The European Seafood Exposition is the leading seafood show in Europe. It takes place every year in Brussels, Belgium. The last ESE was held on May 6-8, 2003, and the next ESE will take place on May 4-6, 2004.

All information to participate is located at: <http://www.euroseafood.com>

FAS/Paris promotes seafood products in France through trade shows and marketing activities. The best way for a U.S. company to penetrate the French market is to participate in trade shows. FAS/Paris recommends the following trade shows which are USDA-endorsed and where U.S. companies participating in USDA's Market Access Program (MAP) can be reimbursed up to 50 percent of their expenses if they join the U.S. Pavillon.

- SIAL (International Food Show), France

The International Food Show (SIAL) takes place every other year in Paris, France. It is the EU's leading food show along with Germany's ANUGA. In 2002, there were 5,240 exhibitors in total and 135,000 visitors at SIAL. Next SIAL will take place in 2004 on October 17-21. Information to participate is located at: <http://www.sial.fr>

SIAL is a USDA-endorsed show with U.S.A. Pavilions. To participate in the USA Pavilion at SIAL, please contact:

IMEX Management, Inc.
505 East Boulevard, Suite 200
Charlotte, NC 28203
Tel: 704 365 0041
Fax: 704 365 8426
Email: sial@imexmgt.com
Contact: François Gros

- SIRHA (International Hotel Catering and Food Trade Exhibition)

A USDA-endorsed show with a U.S. Pavilion.

SIRHA is the premier international forum for the Hotel, Restaurant, and Institution (HRI) Food Service Sector. It is also the international meeting place for Chefs and food professionals.

SIRHA showcases quality food and food ingredient products as well as foodservice equipment and industry innovation. This show, closely linked to Chicago's National Restaurant Association Trade Show, is also host to the world famous "Bocuse d'Or" and the World Pastry Cup culinary competitions.

In 2003, SIRHA had 1,540 exhibitors, including 234 exhibitors from 19 countries. There were 160,000 visitors including 6,300 international visitors from 75 countries and 650 journalists from all over the world.

Visitors at SIRHA are hotel/restaurant managers, caterers, wholesalers, distributors and importers from supermarkets and the food service and retail sectors.

To participate at SIRHA in January 2005, please contact:

Maria Nemeth-Ek/Sharon Cook
Trade Show Office
USDA - FAS
1400 Independence Ave., SW - Stop 1052
Room 4939 - South Building
Washington, D.C. 20250-1052
Tel: (202) 720 3623
Fax: (202) 690 4374
Email: nemeth@usda.gov
sharon.cook@usda.gov

or:

SEPELCOM
Marie-Odile Fondeur
Avenue Louise Bleriot - BP 87
69683 Chassieu Cedex
Tel: (33-4) 72 22 3241
Fax: (33-4) 72 22 3218

Email: mofondeur@sepelcom.com

Internet: www.sirha.com

U.S. Seafood Cooperators in France

The Alaska Seafood Marketing Institute (ASMI) promotes U.S. wild salmon, Alaska pollack and surimi in France. ASMI's website is:

<http://www.alaskaseafood.org>

ASMI is represented in France by MARKONSULT
58, rue Pottier
78150 Le Chesnay
Tel: (33-1) 39 23 20 07
Fax: (33-1) 39 23 20 17
NMasson@Alaskaseafood.org

The American Seafood Institute (ASI) promotes U.S. seafood from the East coast, lobster, scallops, monkfish and dogfish.

ASI/Rhode Island Seafood
212, Main Street, Suite 3
Wakefield
RI 02879
Tel: (401) 364 6185
fax: (401) 789 9727

East Coast Seafood France SARL (U.S. lobster)
Dominique Moreau
1, rue de la Corderie
94586 Rungis Cedex
tel: (33-1) 49 78 92 54
fax: (33-1) 46 86 35 74
dmoreau@myseafood.com

FAS/Paris and the State Regional Trade Groups (SRTGs), i.e., SUSTA, WUSATA, Food-Export-USA and MIATCO conduct promotional activities for seafood products in France. For more information on these activities, please visit our website or contact FAS/Paris directly. For additional information on above trade shows and activities, please contact FAS/Paris at:

agparis@usda.gov

or visit our website at: <http://www.amb-usa.fr/fas/hfas.htm>

SUSTA Initiative:

The Southern US Trade Association (SUSTA) has recently launched a project to help Southern US seafood companies develop markets in Europe, and France in particular. The seafood species SUSTA is targeting are catfish, clams, conch, crab, crawfish, monkfish, oysters, scallops, shark, shrimp, spiny lobster, squid and trout. Interested U.S. exporters and French importers may contact:

Kara H. Smith
SUSTA European Seafood Initiative Project Manager
Taskforce Europe
J. v. Oldenbarneveltlaan 4

2582NN The Hague, Netherlands

tel. +31 (0) 70 322 8050

fax +31 (0) 70 322 8049

mobile +31 (0) 65157 8037

kara@taskforceeurope.com

<http://www.taskforceeurope.com>

<http://www.susta.org>